



Peer Technical Assistance (TA) Summary

Requesting Agency:	West Virginia Department of Health and Human Resources (DHHR), Division of Family Assistance
Point of Contact (POC):	Pam Mills
POC Telephone No.:	304-558-2679
POC E-Mail Address:	pammills@wvdhhr.org
TA Event:	115
TA Requested:	The State of West Virginia requested technical assistance in the form of a 1 1/2 day Roundtable event on strategies and best practices for maximizing the use of the Earned Income Tax Credit (EITC) for the benefit of TANF participants and other working poor.
TA Goal:	To continue West Virginia's efforts to educate community partners regarding the benefits of the Earned Income Tax Credit (EITC) for West Virginia's working poor and to continue to increase the effectiveness of the State EITC Campaign.
TA Format:	Roundtable with State Department of Health and Human Resources and Department of Revenue staff, Federal Internal Revenue Service and FDIC staff along with community-based organizations from throughout the State.
Sample Evaluations:	<p>Evaluations from the event suggest that participants strongly agreed that the Roundtable event was a success and very helpful to the State's EITC efforts. Selected highlights from the evaluations include:</p> <p>"This event was an excellent catalyst for coalition-building."</p> <p>"This is very impressive: agreements and solid partnerships with organizational commitments were reached early in the process. This is a model agenda for the rest of the country."</p> <p>"The most useful aspect of the Roundtable was learning how other States have implemented EITC outreach initiatives."</p>

Analysis:

The Earned Income Tax Credit (EITC) has been instrumental in closing the poverty gap for many of the nation's working poor. Enacted by Congress in 1975, the Federal EITC is a refundable tax credit that increases the income of low-and moderate-income working families by providing tax reductions and cash supplements. As a Federally-funded anti-poverty initiative, the primary purpose of the EITC is to help employed low wage earners maintain their financial self-sufficiency by offsetting taxes, supplementing wages, and making work more attractive than welfare.

The Roundtable event in West Virginia was attended by Federal agency staff, State agency staff, and local representatives from the various service regions throughout the State. Local Community Action Agencies (CAAs) were represented, as was the West Virginia University Extension Service. Overall, the Roundtable was designed to impart knowledge about the EITC, foster peer-to-peer learning, highlight best practices on EITC outreach and free tax preparation from around the country, provide helpful tools for launching an EITC campaign, and facilitate the development of local and regional action plans for immediate implementation.

The Roundtable included comprehensive information sharing related to the EITC. Roundtable participants were offered numerous presentations detailing the purpose of, and eligibility for, the EITC, unclaimed benefit totals from FY 2004, why TANF recipients are a good target audience for an EITC initiative, and examples of EITC Initiatives from other cities such as Benton Harbor, MI, Waco, TX, and Jacksonville, FL. Federal Internal Revenue Service (IRS) staff presented on the various aspects of Volunteer Income Tax Assistance (VITA) sites, the IRS rural outreach initiative, and other helpful resources available from the IRS such as Taxwise software. In addition, a representative from Corporate Voices offered a presentation on engaging employers in EITC initiatives, and a representative from the Federal Deposit Insurance Corporation (FDIC) discussed the Money Smart curriculum and other financial literacy resources. Also included were presentations by a local representative from the State of Oklahoma on mobile rural tax preparation and West Virginia State agency staff about current efforts underway in West Virginia related to the EITC.

The Roundtable also included the creation of local action plans for EITC initiatives throughout West Virginia. During various breakout sessions, Roundtable participants divided into local regional teams to develop community outreach strategies, identify potential collaborative partners, and identify potential challenges to success.

Additionally, breakout sessions also afforded participants the opportunity to leverage the Roundtable as a catalyst for a coordinated Statewide EITC campaign. Although a Statewide West Virginia EITC Campaign has existed since 2000, discussions at the Roundtable added structure to the Statewide campaign by identifying a project coordinator, forming steering committees at the State and regional levels, formulating a statewide action plan, and creating a listserv for communication.

Overall, participants, speakers, and facilitators agreed that the Roundtable was a resounding success that helped to build the statewide and local capacity for West Virginia to organize local initiatives, access resources, and develop collaborative partnerships related to the EITC.

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